A3470-1 U 4/92

The 1991 Bicycle Market in Review

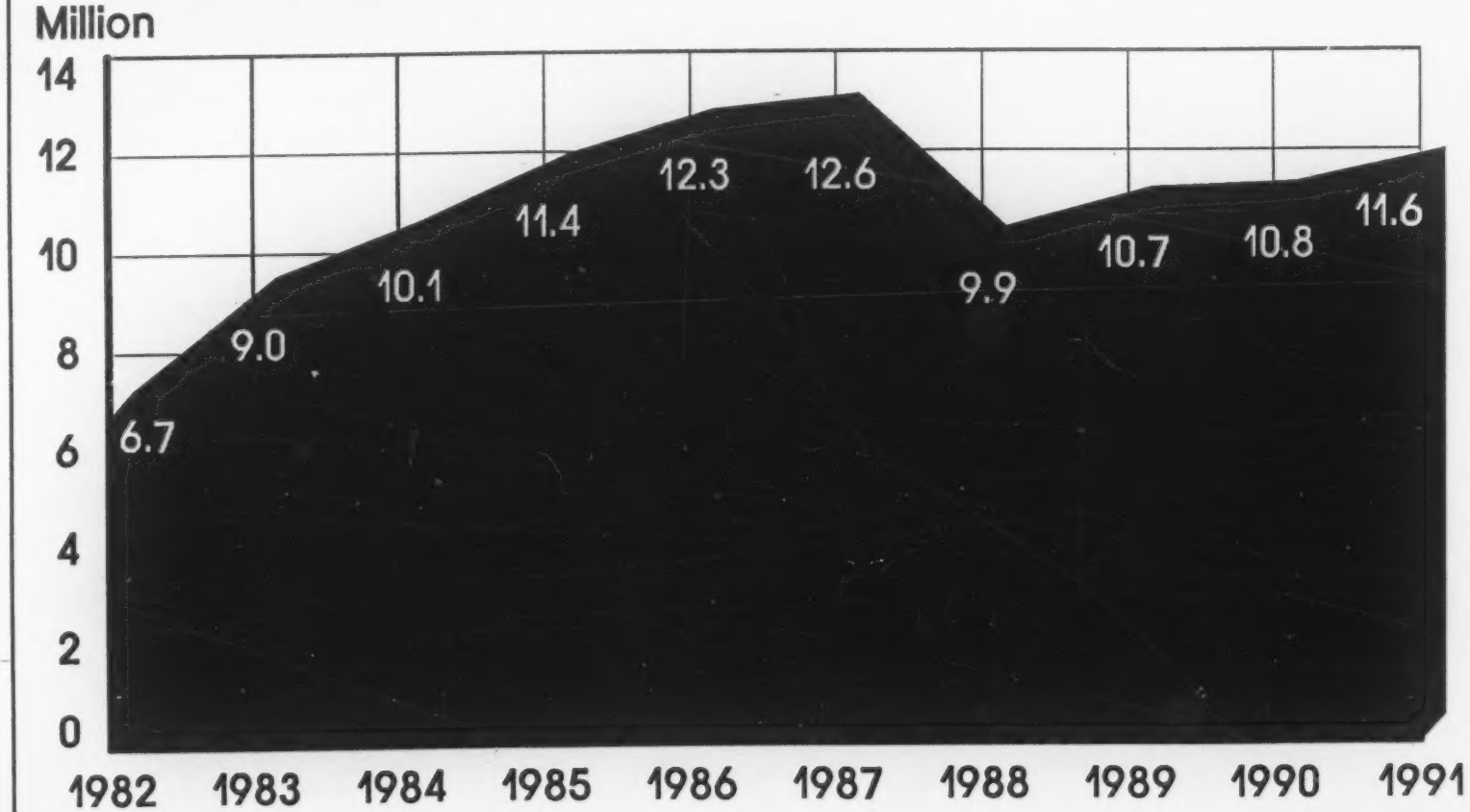
BMA

Total USA Bicycle Market
Domestic Produced Bicycles
Imported Bicycles
Summary

Total USA Bicycle Market

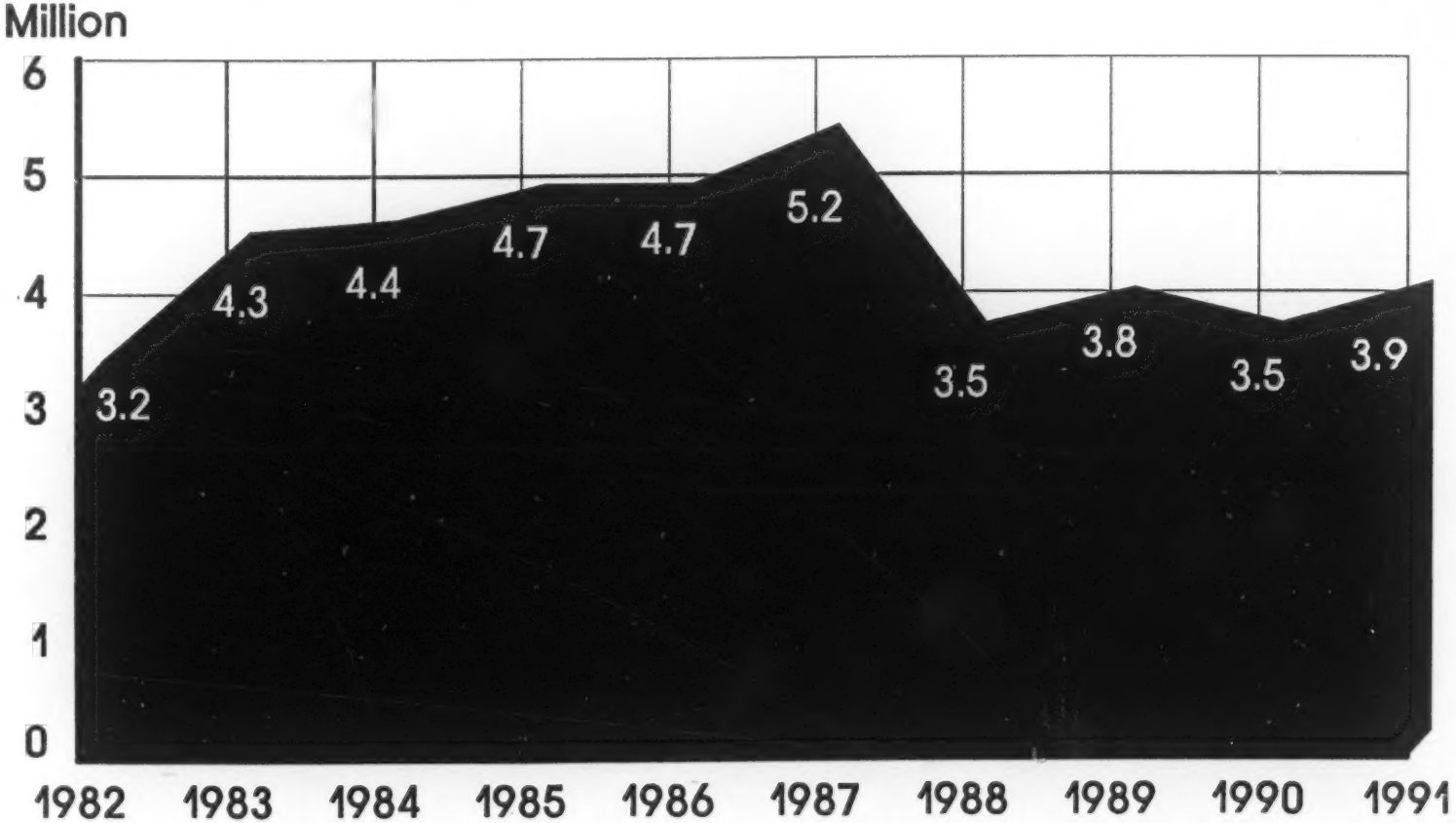
USA Bicycle Market

10 Year History



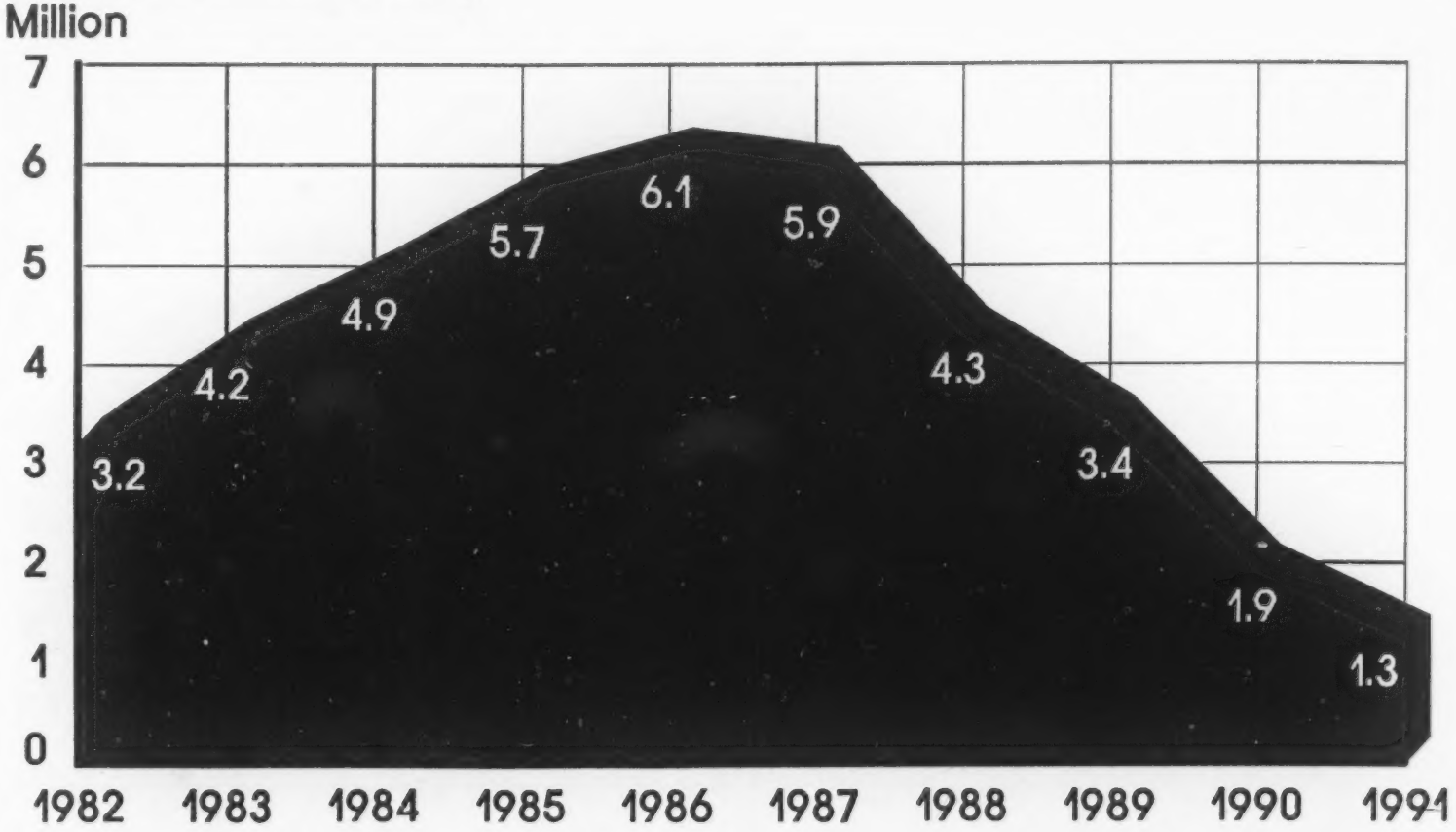
USA 20" Bicycle Market

10 Year History



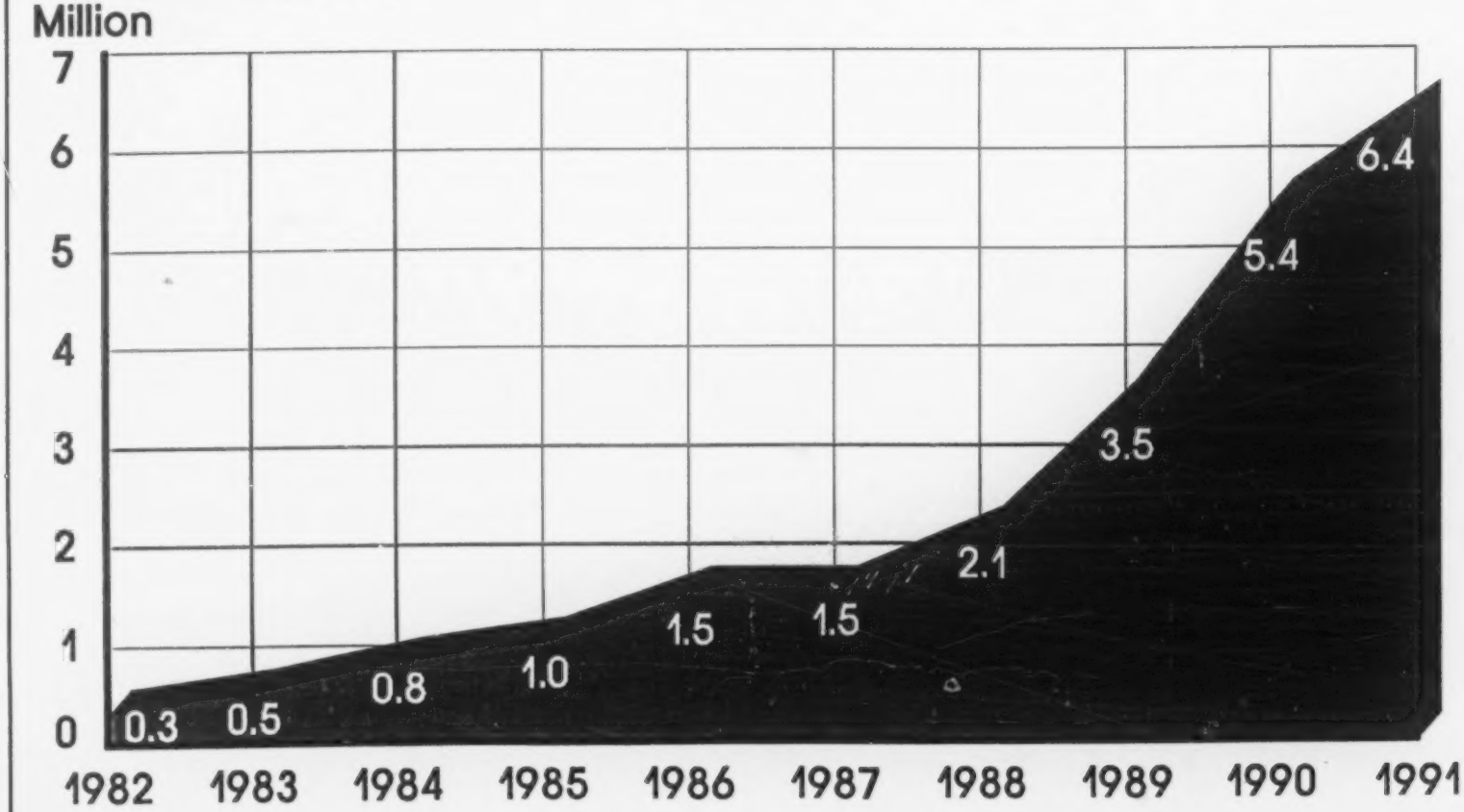
USA Lightweight Market

10 Year History



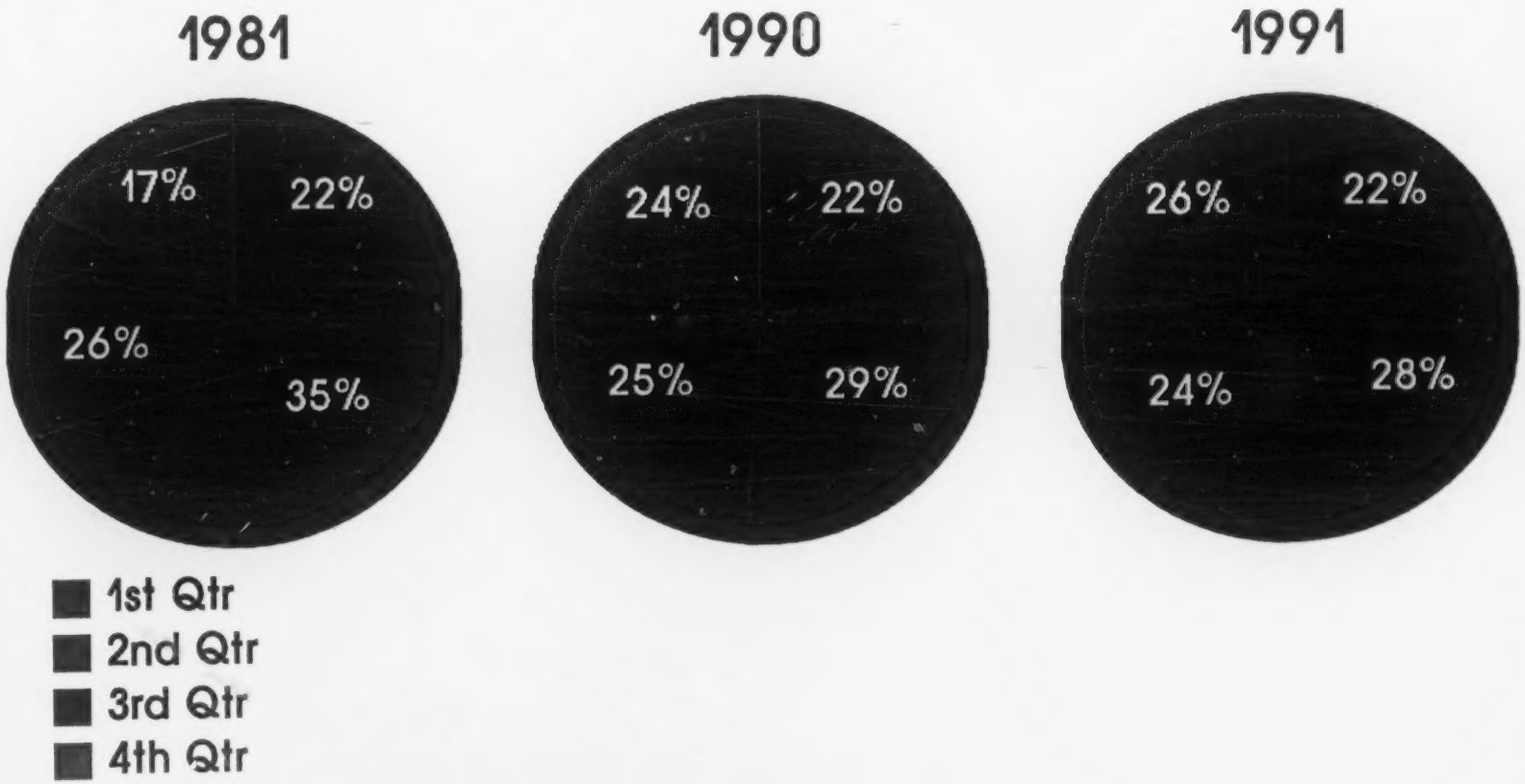
USA "Other" Bicycle Market

(ATB/Cruisers, Middleweights & All Others)
10 Year History



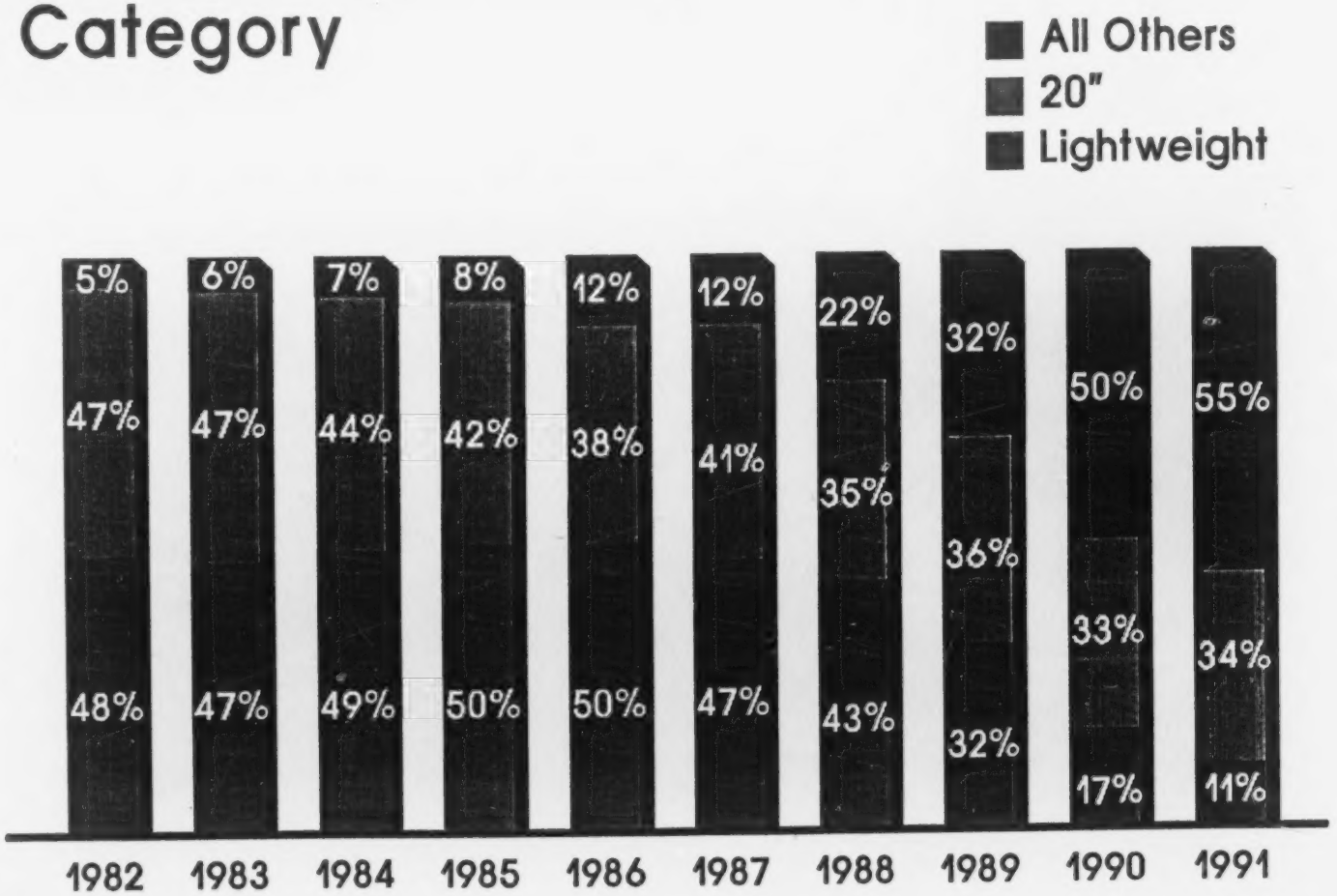
Bicycles Entering USA Market

Percent by Quarter 1981-1990-1991



USA Bicycle Market

By Category



Percent Bicycles Entering USA Market

	1981		1990		1991	
Month	Month	Qtr. Cum.	Month	Qtr. Cum.	Month	Qtr. Cum.
Jan	4.7%		6.5%		6.6%	
Feb	7.7		6.9		7.0	
Mar	9.9	22.3%	8.8	22.2%	8.2	21.8%
Apr	11.9		10.7		9.6	
May	12.0		9.1		9.4	
Jun	10.3	56.5	8.9	50.9	8.9	49.7
Jul	9.5		8.6		6.9	
Aug	9.1		8.1		8.4	
Sep	8.3	83.4	8.0	75.6	9.1	74.1
Oct	8.6		10.0		11.0	
Nov	5.2		8.2		8.5	
Dec	2.8	100.0%	6.2	100.0%	6.4	100.0%
Total	100%		100%		100%	

Domestic & Import Market Share

1991 vs 1990 By Major Categories

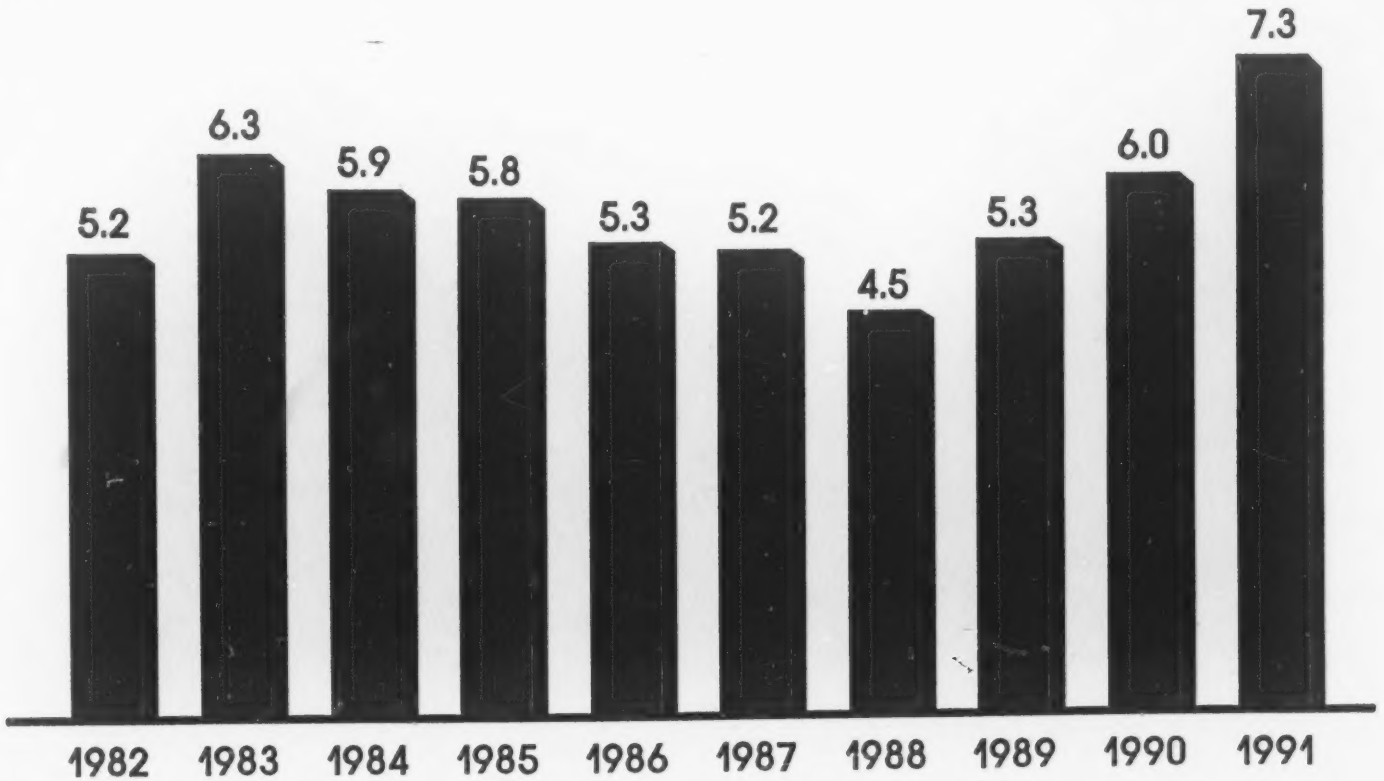
	1990			1991		
Category	Domestic	Imports	Total	Domestic	Imports	Total
20"	20.7%	12.0%	32.7%	22.3%	10.5%	32.8%
Ltw	7.0	10.4	17.4	4.0	7.1	11.1
All Other	27.7	22.2	49.9	36.0	20.1	56.1
Total	55.4%	44.6%	100%	62.5%	37.5%	100%

Domestic Produced Bicycles

Domestic Bicycle Shipments

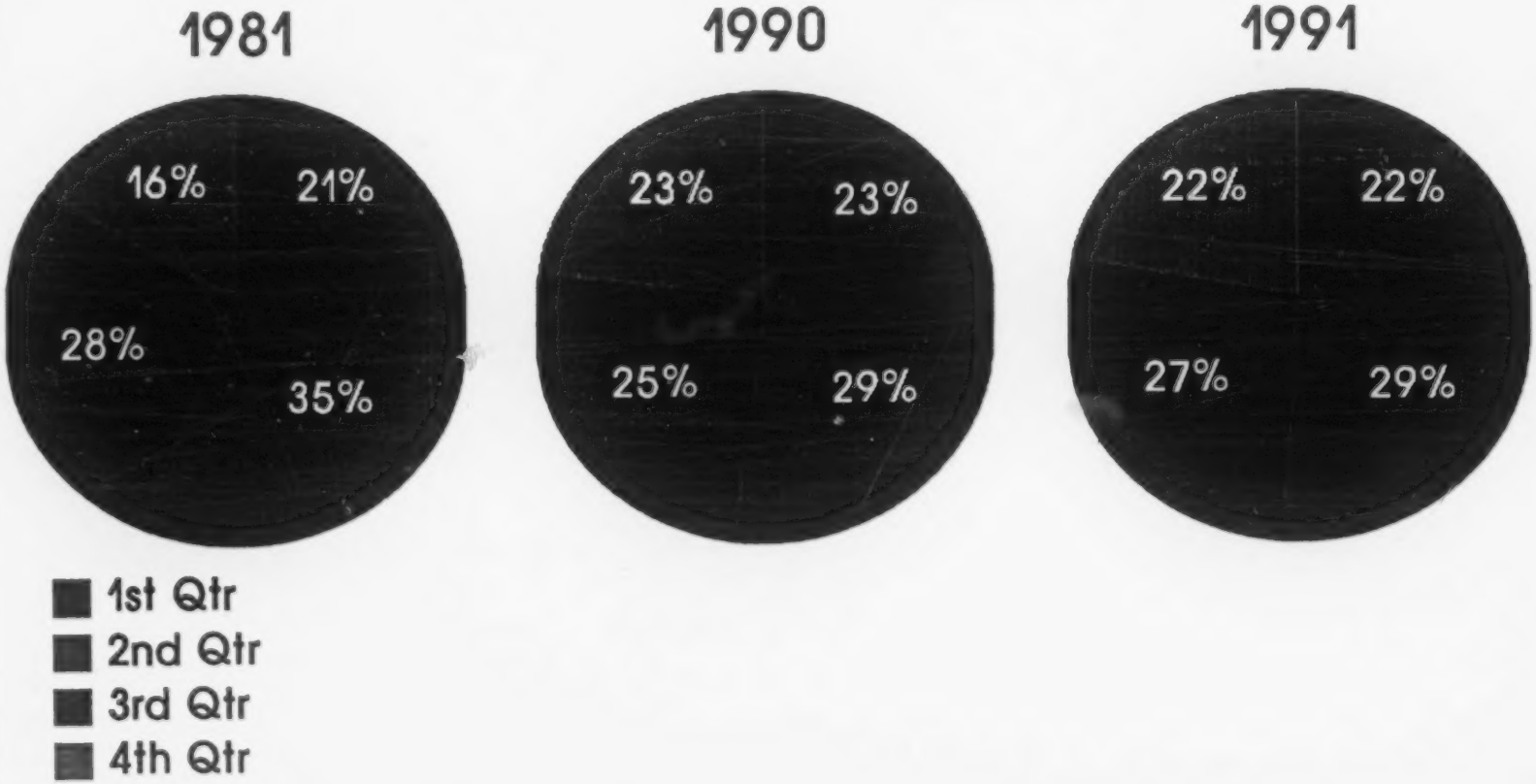
10 Year History

Million



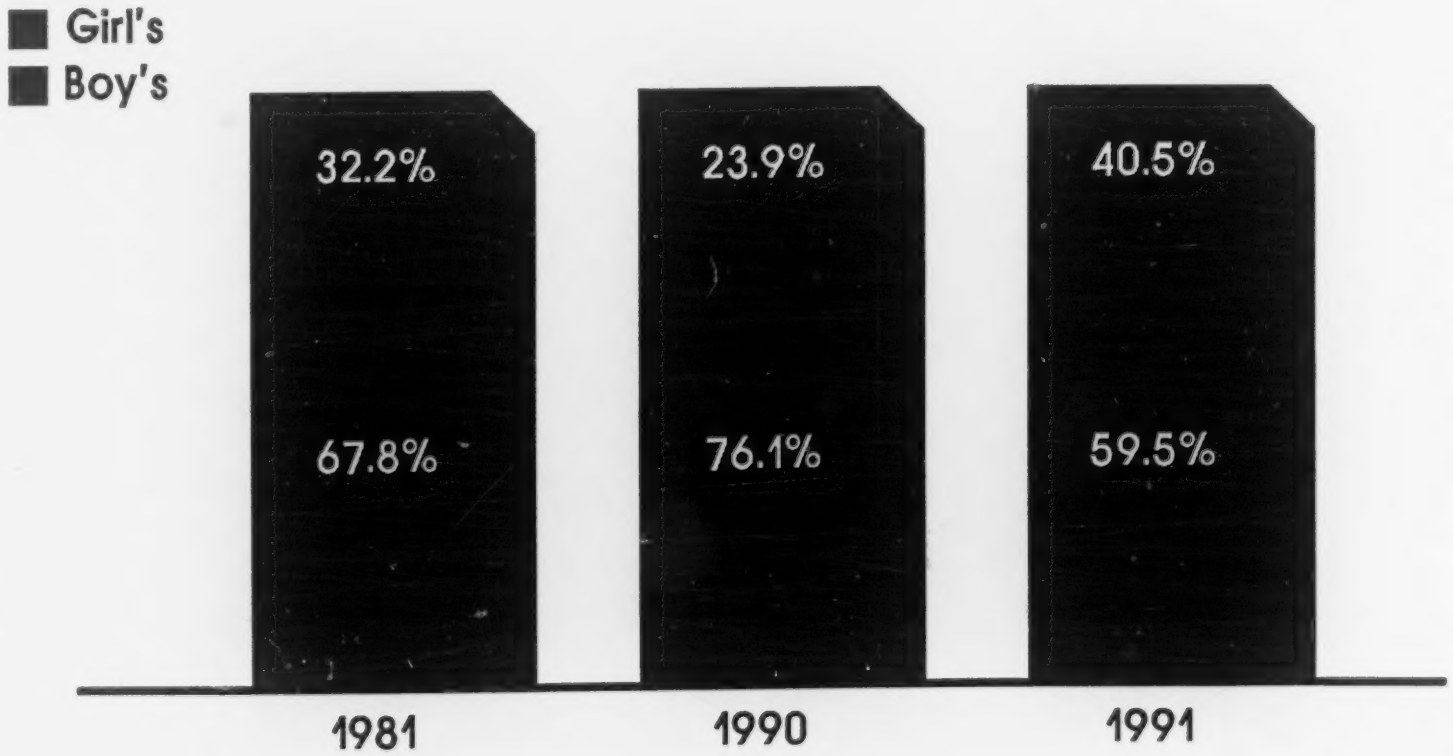
Domestic Bicycle Shipments

Percent by Quarter 1981-1990-1991



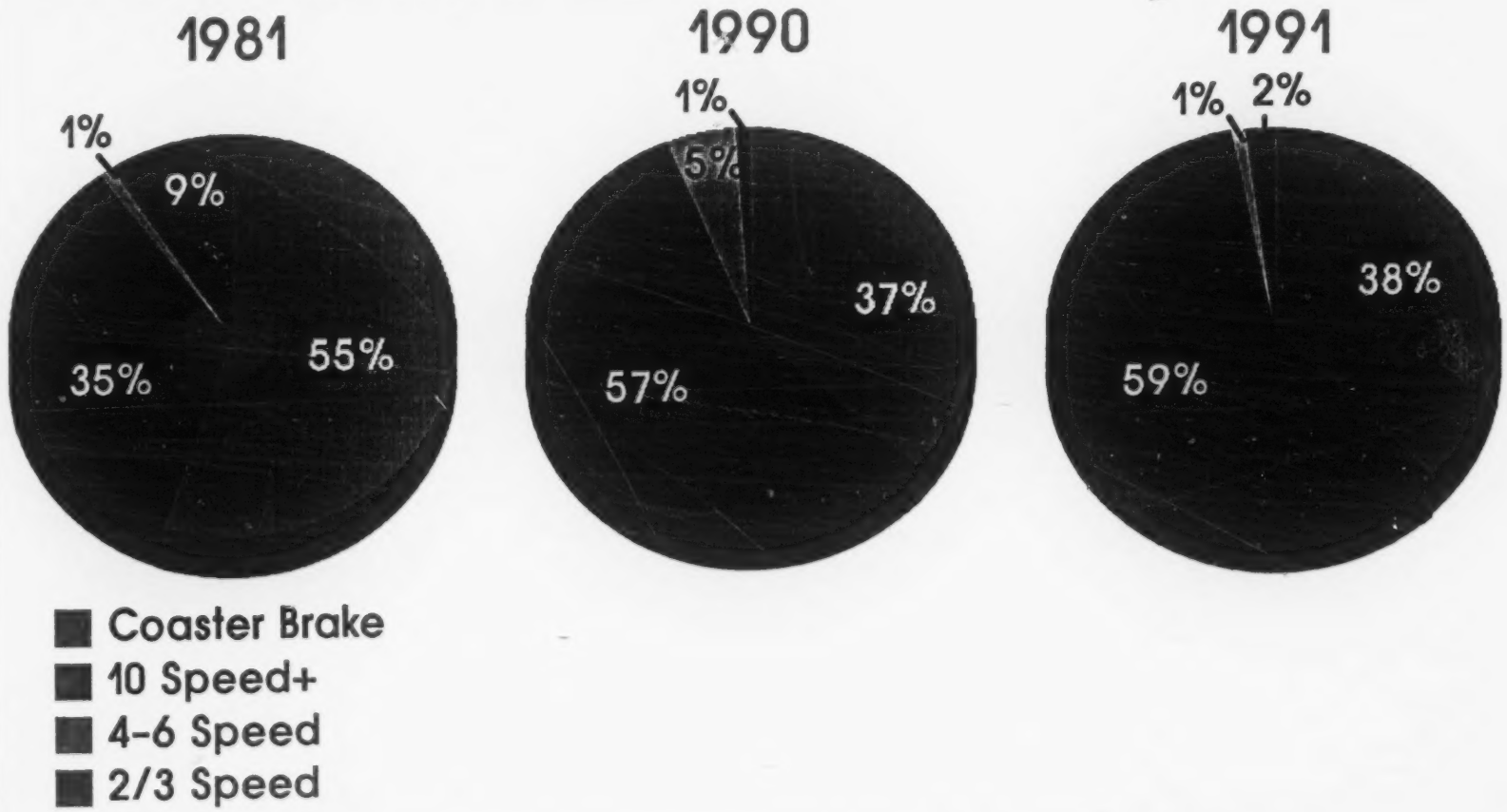
Domestic Bicycle Shipments

% Boy's and Girl's Models

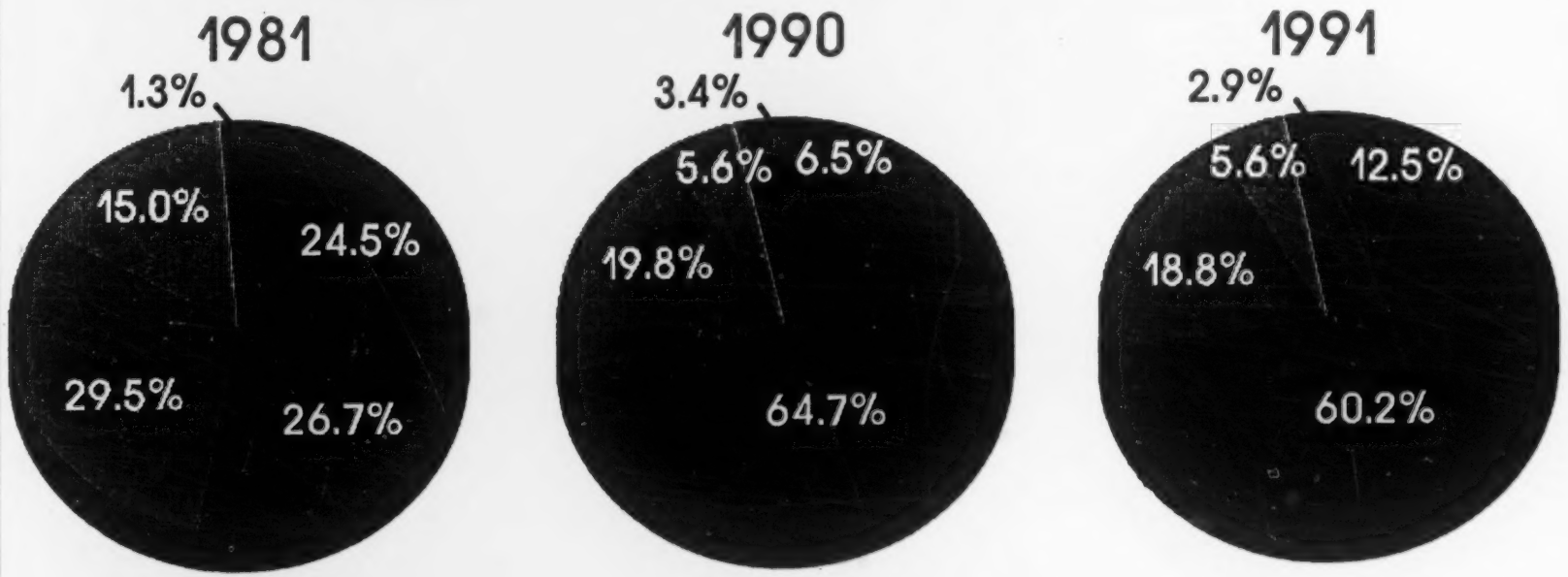


Domestic Bicycle Shipments

Percent by Type Hub



Where Domestic Manufacturers Sell Their Bicycles (%)



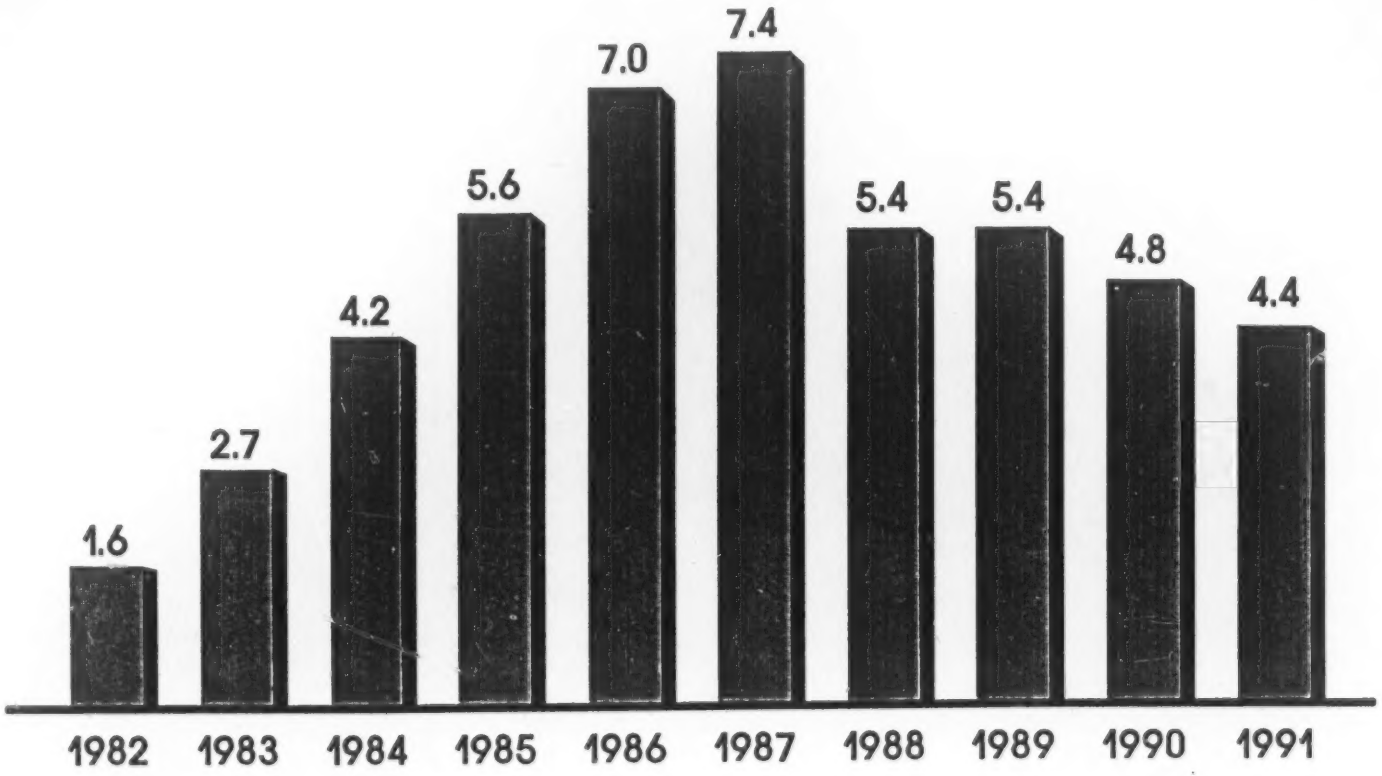
* Includes outlets not elsewhere classified such as bicycle shops, catalog showrooms, etc.

Imported Bicycles

Imported Bicycles

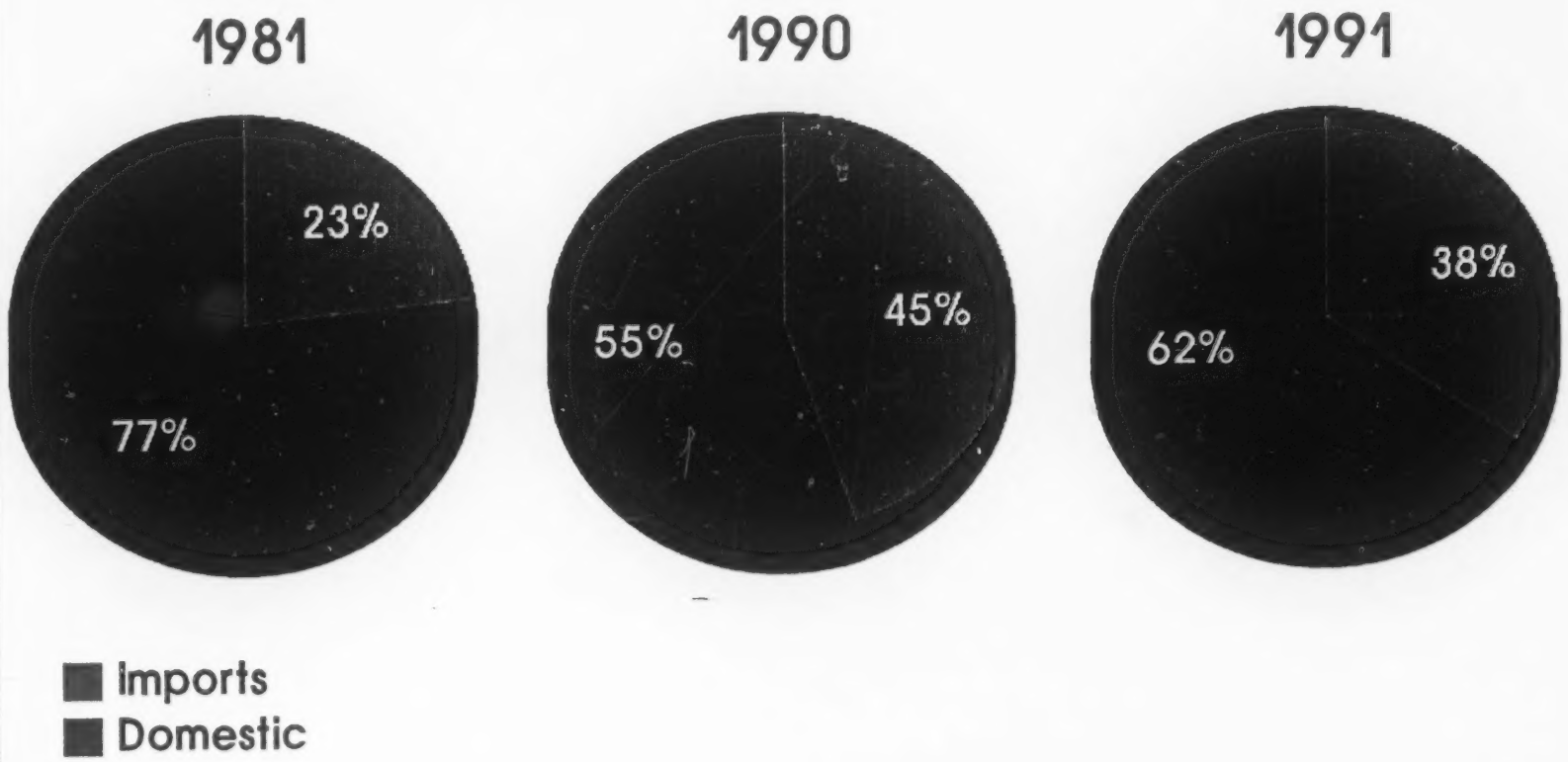
10 Year History

Million



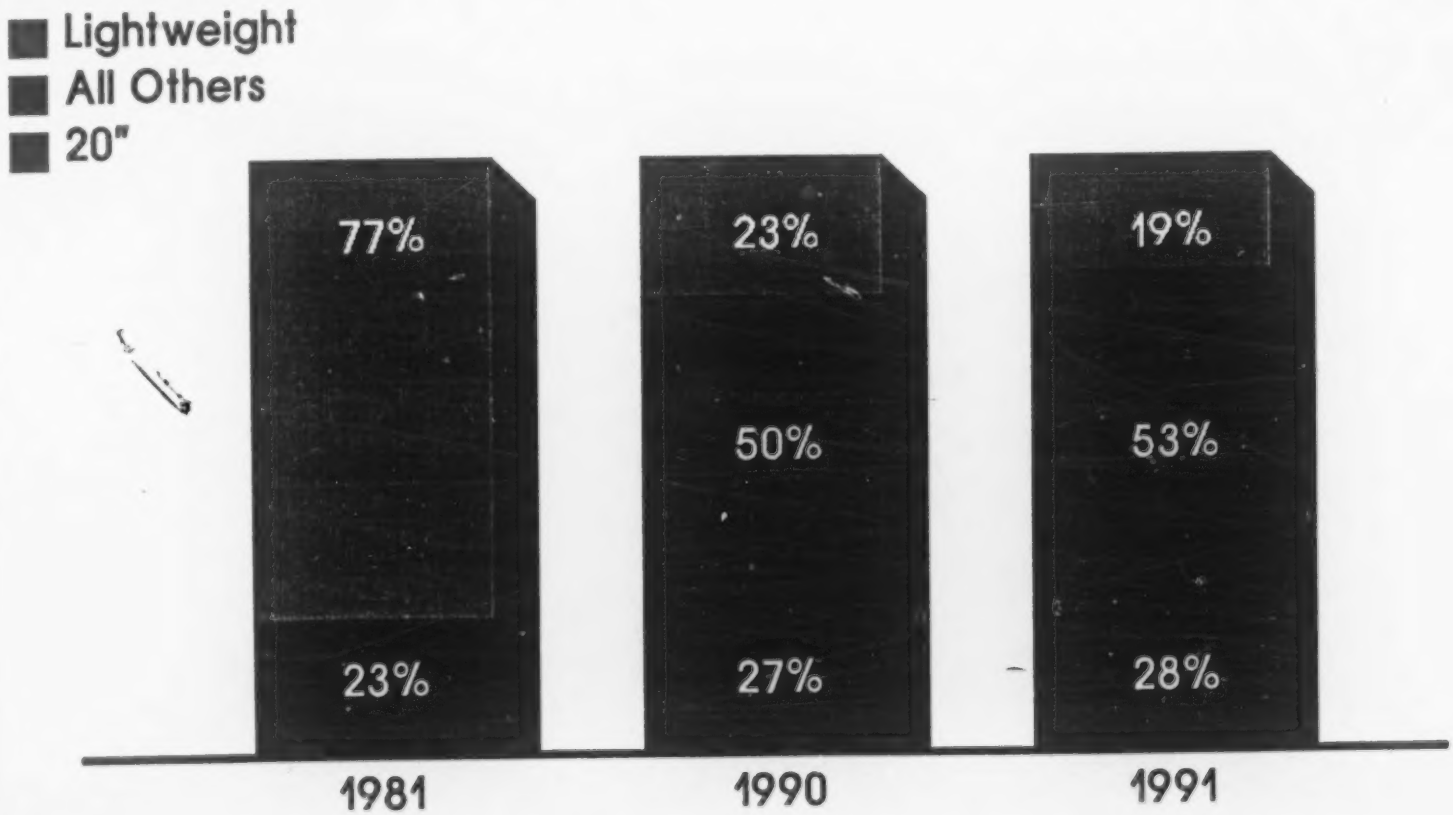
Imported Bicycles

Percent Share 1981-1990-1991



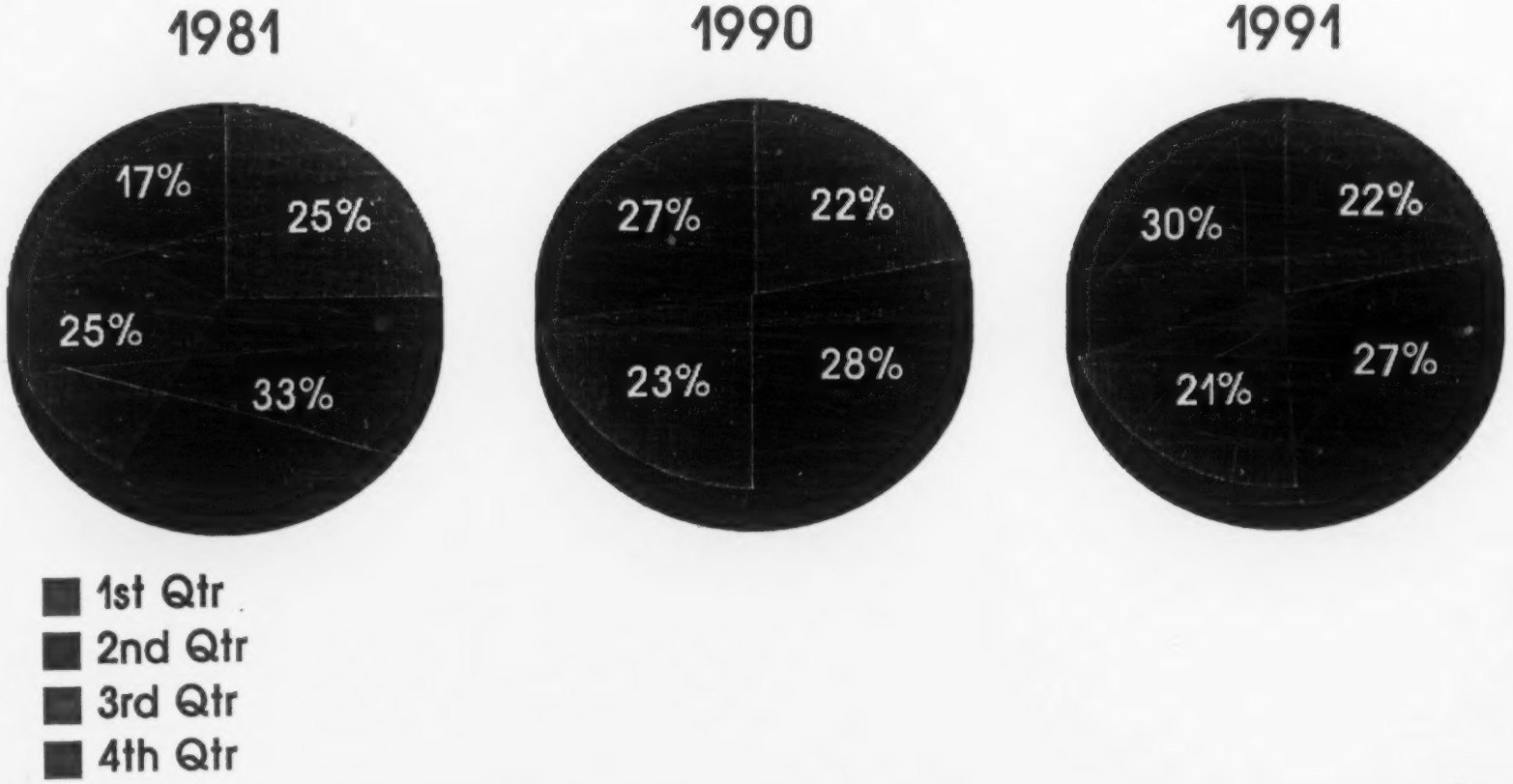
Imported Bicycles

By Type



Imported Bicycles

Percent by Quarter 1981-1990-1991



Imported Bicycles

1990-1991 Monthly Comparison (000)

Month	1990	1991	% Chg
Jan	371	362	(2)
Feb	272	317	17
Mar	395	296	(25)
Apr	433	412	(5)
May	484	399	(18)
Jun	449	351	(22)
Jul	400	227	(43)
Aug	353	295	(16)
Sep	368	380	3
Oct	382	474	24
Nov	461	497	8
Dec	442	362	(18)
Total	4810	4372	(9)

Imported Bicycles

Percent by Country of Origin

Country of Origin	1981	1990	1991
Taiwan	52.1%	73.8%	73.2%
Korea	6.2	8.6	3.5
Japan	31.3	1.9	1.2
China	.1	10.0	17.2
Hong Kong	.3	1.5	.8
Thailand	NA	2.8	0.1
France	3.0	--	--
All Others	7.0	1.4	4.0
Total	100%	100%	100%

Average Dollar Value* Per Unit Of 20" Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
Taiwan	51.00	51.69	46.24	42.10	42.15	50.98	49.66	42.76	53.69	49.34
Japan	93.73	104.88	105.08	99.94	118.86	82.09	150.00	61.43	110.41	NA
Korea	50.68	35.45	45.55	43.03	40.23	42.19	42.52	43.25	44.43	41.66
China	NA	NA	NA	NA	NA	20.37	19.12	25.29	28.55	27.97
Hong Kong	NA	NA	NA	NA	NA	NA	NA	38.30	28.59	NA
Thailand	NA	NA	NA	NA	NA	NA	NA	42.32	45.41	47.03
Average	$53.37	$54.41	$47.54	$43.61	$43.04	$49.89	$46.28	$40.81	$45.79	$40.87

* Estimated Customs Value FOB Foreign Port

Average Dollar Value* Per Unit Of Lightweight Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
Taiwan	61.75	58.08	57.46	51.34	53.09	74.68	89.84	88.59	115.12	128.07
Japan	114.73	110.41	121.36	107.79	139.02	160.18	195.37	232.72	251.35	308.45
Korea	58.56	54.43	53.16	48.23	45.59	43.44	48.92	55.82	61.48	89.16
China	NA	NA	NA	NA	NA	51.04	53.48	56.88	74.84	85.44
Hong Kong	NA	NA	NA	NA	NA	NA	NA	68.18	73.73	NA
Thailand	NA	NA	NA	NA	NA	NA	NA	50.10	52.32	77.10
Average	$83.80	$75.59	$73.22	$63.50	$64.45	$76.37	$83.56	$83.88	$103.26	$123.74

* Estimated Customs Value FOB Foreign Port

Average Dollar Value* Per Unit Of Other Bicycle Imports**

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
Taiwan	75.19	68.49	63.75	69.66	74.87	87.16	108.70	120.06	126.46	121.75
Japan	174.01	186.67	158.50	147.77	192.78	208.48	256.80	256.26	245.17	394.12
Korea	NA	NA	57.48	53.66	47.10	42.87	50.67	67.70	81.68	74.78
China	NA	NA	NA	NA	NA	NA	45.53	90.28	105.97	100.75
Hong Kong	NA	NA	NA	NA	NA	NA	NA	95.11	53.66	NA
Thailand	NA	NA	NA	NA	NA	NA	NA	50.04	58.92	74.96
Average	$81.08	$86.17	$73.83	$75.40	$81.47	$83.77	$114.17	$119.15	$114.17	$121.78

* Estimated Customs Value FOB Foreign Port

** TSUS Items 732.2100 & 732.2400 Includes Primarily ATB Bicycles

Summary

- A total of 11,641,571 bicycles entered the USA market during 1991, up 7.3% over 1990 and 10.1% above the 10 year average of 10,470,000 units.
  - 20" bicycles were up 8% compared to 1990.
  - Lightweight units were down 45%.
  - ATB and all other units were up 18% in 1991.
  - Volume of bicycles entering the USA market was greatest in the second quarter, followed by the fourth quarter, third quarter and first quarter, in that order.

Summary

- Domestic shipments were 7,270,521 up 21.6% over 1990 and up 28% over the 10 year average of 5,680,000.
  - Most units in over ten years
  - Domestic shipments represented 62% of the total market up from 55% in 1990.
  - 29% of the domestic shipments were made in the second quarter, 27% in the third quarter and 22% in both the first and fourth quarters.

Summary

- Imports at 4,371,050 dropped 9.1% from 1990 and fell 9.1% below the 10 year average of 4,810,000.
  - Over 7 out of 10 imports originated in Taiwan, same as 1990.
  - Imports from China amounted to 17% of the total, to remain the second largest source of imports.
  - Taiwan, China and Korea accounted for 94% of all imports.
- Average prices of imports
  - 20" units $40.87 down 10.7% from 1990
  - Lightweight units $123.74 up 19.8% from 1990.
  - ATB and all other units $121.78 up 6.7% from 1990.

Summary

- Finally, with the 1991 bicycle market exceeding the 10 year average by 1,130,000 units and 1991 surpassing the strong 1990 market by 7.3%, the BMA continues to look for a favorable bicycle market in 1992.